

FIG. 1

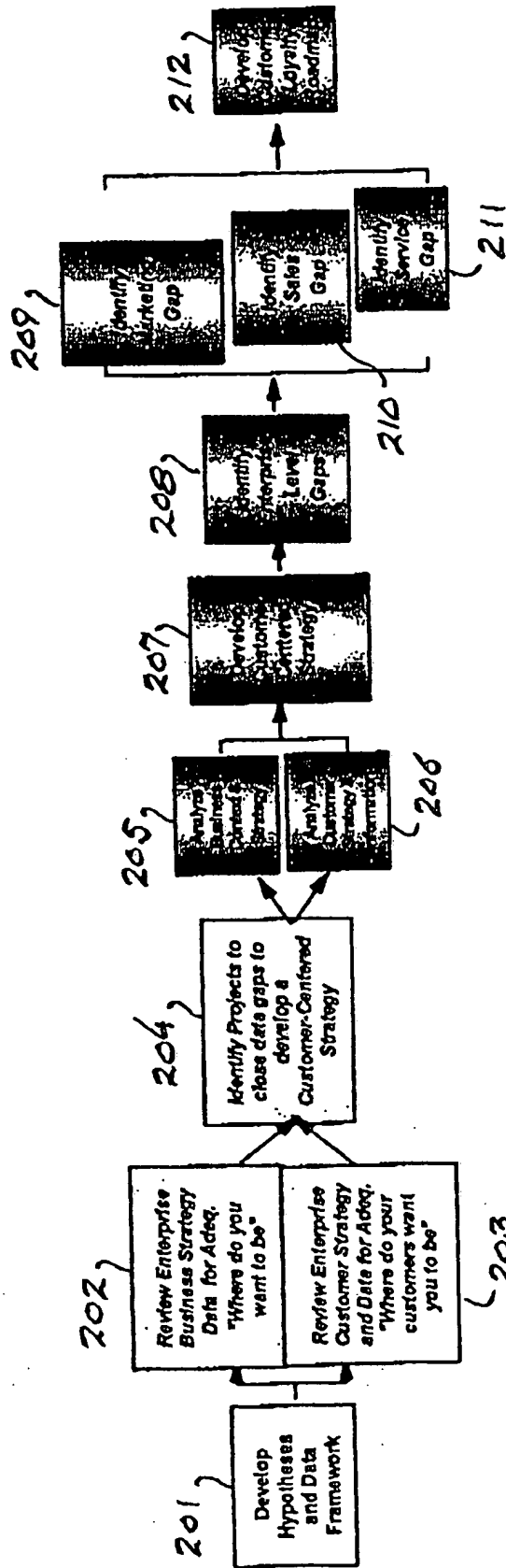


FIG. 2

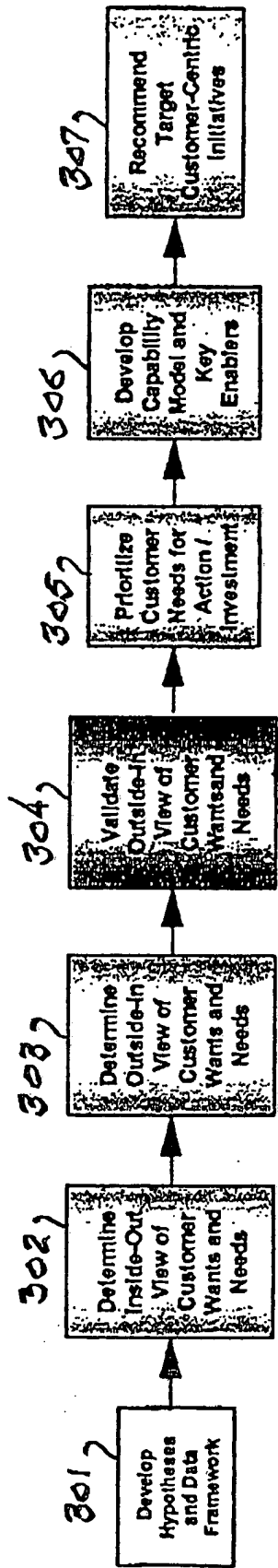


FIG. 3

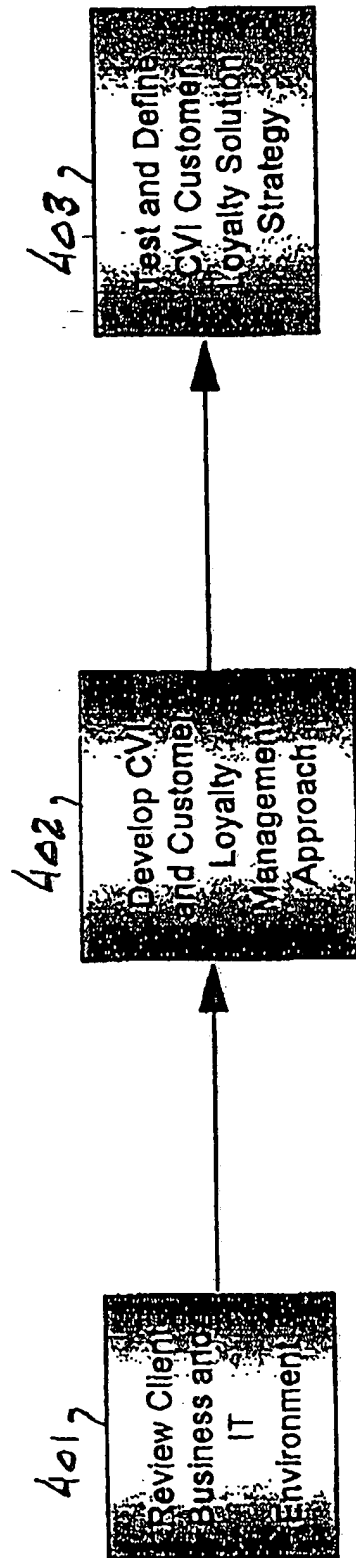


FIG. 4

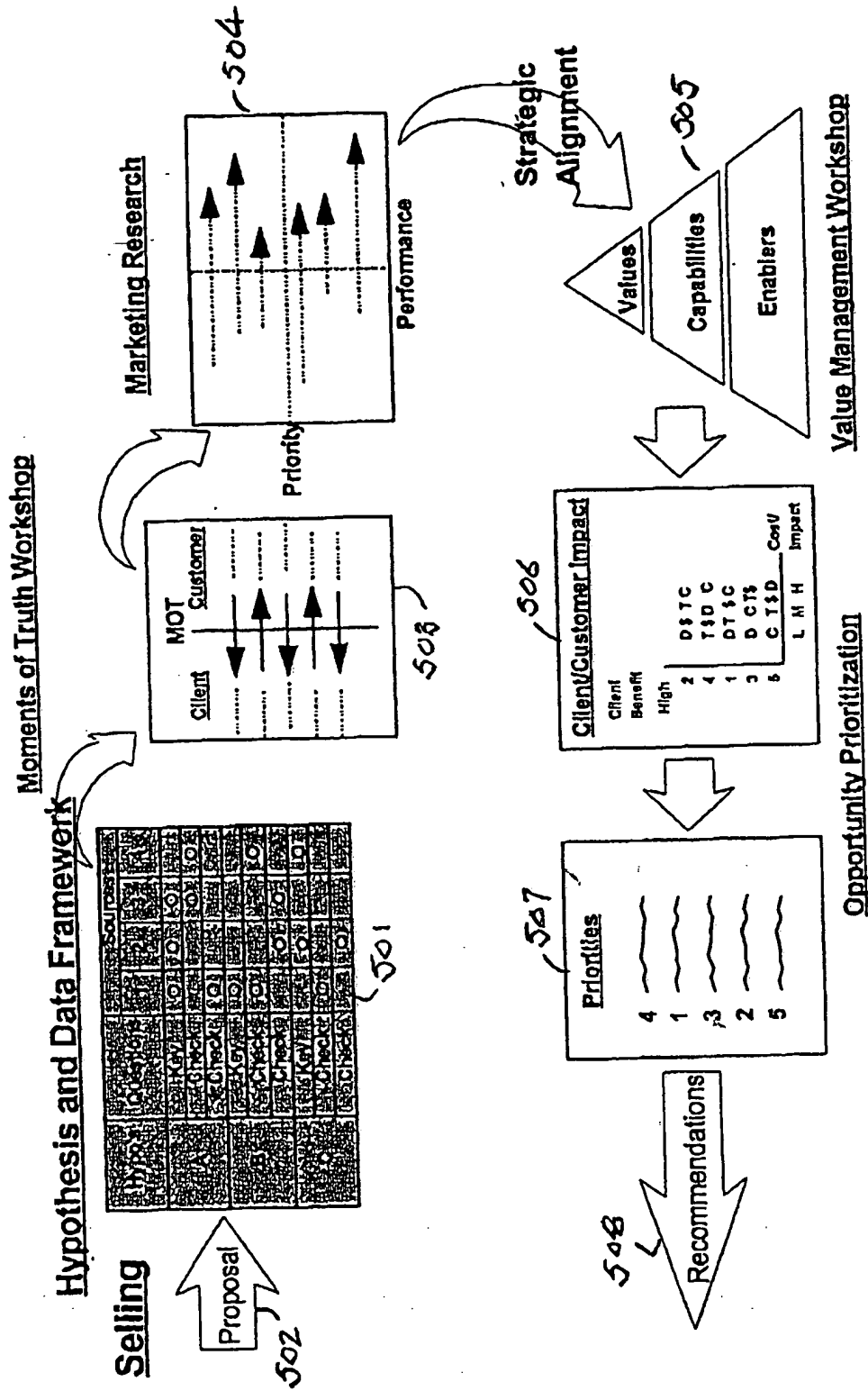


FIG. 5

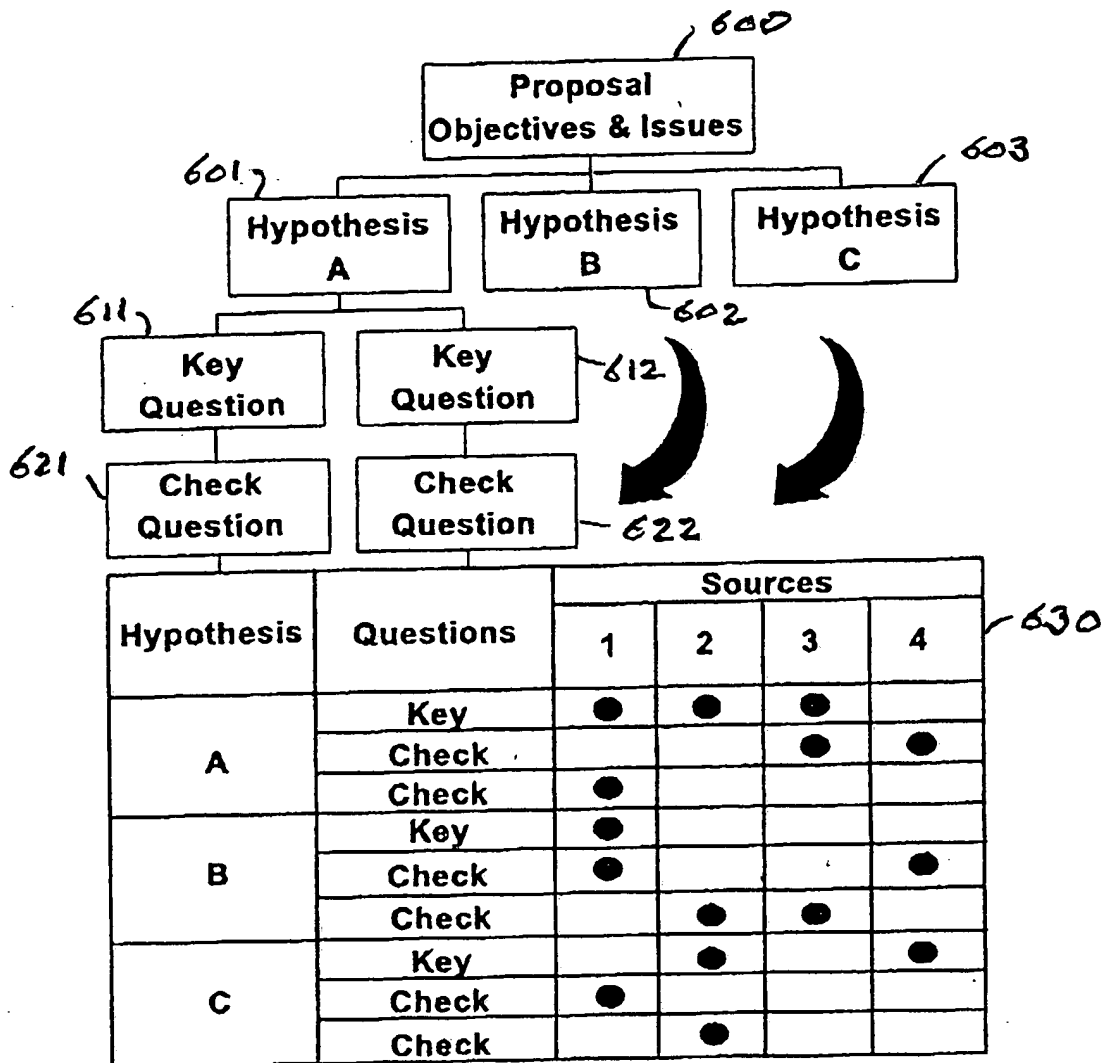



FIG. 6

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**Identify the objectives & issues**



Utilize the proposal, supplemented by interviews with key client executives and stakeholders

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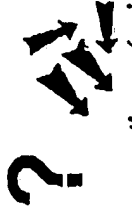
**Develop the hypotheses**



Working with team, for each objective, develop statements (hypothesis) which when proven or refuted would support or achieve the objective

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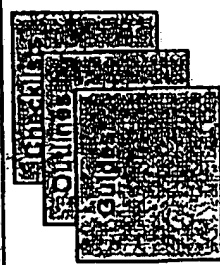
**...and questions/check questions**



Next, develop questions (primary) and check questions (secondary) that focus on collecting relevant facts & findings to derive the conclusions to support the objectives

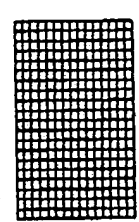
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**...and documentation formats**



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**Create the matrix of data sources**



Utilizing a matrix, identify the data sources that must be used to collect relevant facts and findings, correlated to the data collection method that will be used

FIG. 7

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<div>Issues Hypotheses Questions Data Sources</div>		Data Framework	Sources, i.e.:			
Hypos	Questions	Reports & Documents	Executive Interviews	Existing Research	Other	
ABC Co. has a mission, vision, and strategy which are easily understood and widely known.  Business decisions, goals and objectives are based upon these and are <u>focused</u> upon market segments.	<ul style="list-style-type: none"><li>How is business strategy established and communicated? What are the mission, vision, goals &amp; objectives?</li></ul>					
	<ul style="list-style-type: none"><li>How are decisions made regarding which market opportunities to pursue?</li></ul>					
	<ul style="list-style-type: none"><li>How do current strategies and programs map to the target markets' needs/wants/values?</li></ul>					
Highest value/leverage market segments are identified & targeted.	<ul style="list-style-type: none"><li>What key market segments are identified?</li></ul>					
	<ul style="list-style-type: none"><li>How are segments determined? I.E.: Value to ABC Co.? Common needs/buying behavior?</li></ul>					
	<ul style="list-style-type: none"><li>Who are the <u>targeted</u> high value customers/segments? (Current and future)</li></ul>					

FIG. 8A



Issues Hypotheses Questions Data Sources	Data Framework	Sources, i.e.:			
		Client Interviews/ Workshops	Customer Complaint Records	Existing Research/ Surveys	Add'l Research, i.e.: -Qual. Interviews -Focus Groups -Surveys
Hypos	Questions?				
Moments of Truth (Value) are identified and understood	• What are MOT interactions within the project scope?				
	• Which are the MOTs that can be leveraged to deliver & compete-on value to the customer?				
	• Who receives value at each MOT?				
	• "Whose" opinion (by segment) is important regarding each MOT? i.e.: Who is at the point of interaction (user)? Who makes the buying decision (approver)? Who influences the decision (reviewers or influencers)?				
	• What are <i>Basic</i> needs (not met= drive attrition)?				
Needs/Wants are known by MOT & segment (Customer Vision)	• What are <i>Attractors</i> (if met= drive share)?				
	• What are <i>Satisfiers</i> (which drive satisfaction, but <i>individually</i> do not affect behavior)?				

FIG. 8B

Issues Hypotheses Questions Data Sources	Data Framework Questions	Sources, i.e.:			
		Client Interviews/ Workshops	Customer Complaint Records	Existing Research/ Surveys	Add'l Research, i.e. - Cust. Interviews - Focus Groups - Surveys
Hypos  Customer priorities & performance perceptions are known (by segment)	• What is customer-perceived client performance of each "need"?				
	• What is ABC Co. performance gap with competition?				
	• What attributes differentiate the "best" competitor in the customer's mind?				
	• What are customers "need" priorities (rank/weight)?				
	• What are <u>client</u> improvement priorities? (I.E.: Highly important needs with <u>poor</u> performance or gaps).				
ABC Co. performance improvement priorities are established	• Which <i>Basic needs</i> lag minimum customer expectation (or the avg industry performance)?				
	• Which <i>Attractors</i> lag best competition (or have little/no competitive performance)?				
	• Which <i>Satisfiers</i> lag average industry performance?				

FIG. 8C

Issues Hypotheses Questions Data Sources		Data Framework	Sources, i.e.:			
Hypos		Questions	Cross- functional Workshops	Client Interviews/ Surveys	Secondary Research/ Literature Scan	Primary Research/ Band- mapping
Necessary ABC Co. process Capabilities are present		• What process Capabilities must be present (to meet/deliver targeted customer needs)?				
		• What Capabilities distinguish BOB (in client industry) and <u>worldclass</u> (any industry) companies?				
		• What is current level/presence of these (H/M/L)? (identifies client capability gap to be closed)				
		• Which capabilities are assessed as "zero", "low" or "medium" level of presence (versus high or ideal)?*				
Required ABC Co. Infrastructure Enablers are present		• What are the/their required Infrastructure Enablers?				
		• What Enablers also distinguish BOB/WC co's?				
		• What is current presence (H/M/L/O) of above enablers?				

\* Note: When doing process improvement, analyze only the poor performing (M/L/O) capabilities... but, when reengineering a new process design, also include the high performing capabilities (as they must also be enabled in the new design).

FIG. 8D

Issues Hypotheses Questions Data Sources	Data Framework	Sources, i.e.:			
		Cross-functional Workshops	Finance Org. for Sizing	IT Org. for Sizing	Executive Interviews/Workshops
<p>Hypos</p> <p>Customer-defined infrastructure improvements/investments are identified and prioritized</p>	Questions				
	<ul style="list-style-type: none"> <li>Which are the current M/L/O Enablers?</li> </ul>				
	<ul style="list-style-type: none"> <li>How do they cluster into logical projects, i.e.:                             <ul style="list-style-type: none"> <li>A cluster of similar Enablers, such as several business practice changes, or</li> <li>A group of Enablers to deliver a Capability</li> </ul> </li> </ul>				
	<ul style="list-style-type: none"> <li>What is the relative cost vs business benefit of the different potential projects?</li> </ul>				
	<ul style="list-style-type: none"> <li>What are the prioritized recommended actions? (for highest customer value and client benefit?)</li> </ul>				

FIG. 8E

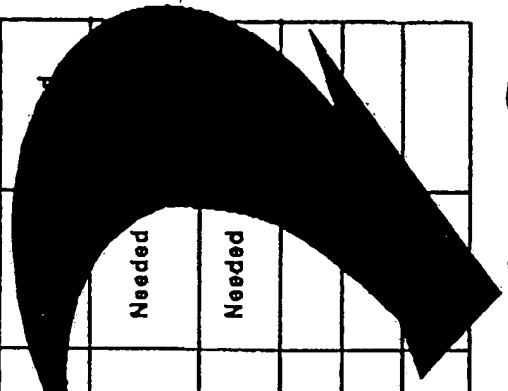
Issues Hypotheses Questions Data Sources	Data Framework	Sources, i.e.:		
		Review Reports/ Process	Executive Interviews	Other
<b>Hypos</b>  An on-going process is in place to use customer value to drive business decisions	<b>Questions</b>			
	<ul style="list-style-type: none"> <li>• How are customer Needs/Wants/Values Identified?</li> </ul>			
	<ul style="list-style-type: none"> <li>• How do customer value and performance perception drive investments and resource allocation?               <ul style="list-style-type: none"> <li>▸ What is the management decision system?</li> <li>▸ How are investment priorities determined?</li> <li>▸ Is customer-feedback an action "driver"?</li> </ul> </li> </ul>			
	<ul style="list-style-type: none"> <li>• What is the closed-loop satisfaction process?               <ul style="list-style-type: none"> <li>▸ Are implemented improvement actions surveyed to determine customer impact?</li> <li>▸ How are new/emerging customer needs ID'd?</li> <li>▸ Are competitive perceptions monitored?</li> <li>▸ Are complaints analyzed for trends?</li> <li>▸ Are customer service requests analyzed?</li> <li>▸ How are the above looped back into the management system to adjust infrastructure?</li> </ul> </li> </ul>			

FIG. 8F

Hypotheses	Key Questions	Sources			
		Existing Data	Interviews	Focus Groups	Surveys
Customer Needs & Wants Are Known	How does Greenback determine customer requirements?	Not Current	Ad hoc	Needed	Needed
	What customer requirements data exists?	Not Available	Not Current	Needed	Needed
	How does Greenback determine customer performance perceptions and satisfaction?	Not Available		Needed	Needed
Other Hypos	What data exists? Who and how is it used?	Not Available		Needed	Needed

FIG. 9

Hypothesis	Key Questions	Sources			
		Existing Data	Inter-views	Focus Groups	Survey
Customer Needs & Wants Are Known	How does Greenback determine customer requirements?	Not Current	Ad hoc	Needed	Needed
	What customer requirements data exists?	Not Available	Not Current	Not Available	Not Available
	How does Greenback determine customer performance perceptions and satisfaction?	Not Available		Needed	
	What data exists? Who and how is it used?	Not Available		Needed	
Others					



"Voice of The Customer"

FIG. 10